Outbound Sales Playbook

Reply

Intro

Whether you're new to the game or an experienced salesperson, sales isn't easy. It takes a mixture of empathy and competitiveness, discipline and creativity, confidence and a willingness to learn. With such a diverse skill set, it's no wonder high-quality salespeople are always in demand.

Along with all the above qualities though, a top salesperson needs a comprehensive understanding of the process. They need a plan.

They need a playbook.

That's where we come in. This playbook is specifically designed to help SDRs master their role, whatever stage they're at in their career. Whether this is your first time as an SDR or you're looking for advice to improve your game, whether you're a company's first and only SDR, or you're joining a team and looking to make your mark, we're here to help.

You're going to learn the tactics and strategies that you can implement today to up your sales game.

List of content

The Team of One

The Team of One

Over the years, we've read a lot of content on sales but, for many people, it's just not relatable. Most of the content out there focuses on sales teams, and when people get their start they may not have a team.

They're a team of one.

Operating as a solo SDR in a startup is a completely different situation to joining an established team at an enterprise outfit. If you're a team of one, you have the whole process to figure out and set up. It's all hands on deck.

On the other hand, if you're joining an existing team, your objectives will be different. How do you stand out? How do you become the top performer? In that case, you're going to need to work more tactically, more strategically. You should think about having a balance of big accounts and small accounts. You will likely have to commit to working extra hours.

When you're the first SDR, it's all about the **process**. To be a top performer, it's more about **discipline**.

That's why this playbook has been specifically written so that, whatever situation you find yourself in, you can benefit.

Overview:

Outbound vs Inbound

Even if this is your first sales job, you'll have quickly realized it's a lot more complex than most non-sales people can begin to appreciate. For starters, the approach has rapidly changed over recent years. While sales used to be all about going out and pitching to prospects (**outbound**), now many make it so the customers come to them (**inbound**).

At its most simple, outbound and inbound represent the two key approaches for sales. However, in practice, we find there are typically **four** different pillars, or categories.

1 Pure Outbound

A 100% outbound approach involves going out into the market and trying to generate interest from scratch. It's all about prospecting, generating cold leads and identifying if there's any interest.

Of course, this doesn't mean that you're prospecting blindly. Rather, you're looking for leads based on very specific requirements, ones that match your identified ideal customer.

In the case of Reply, we reach out to VP of sales, account executives, and BDRs, among others. We get in touch and find out if they're struggling to book more meetings or to stay on top of their leads. 100% cold outbound prospecting is usually carried out by an SDR/BDR.

2 Engagement

The second option involves more of a marketing component. Over the last few years, we've evolved into a different mindset and expanded our outbound marketing roles, where your team pushes your message out to as many people as possible. The objective is to drive engagement with your product, such as prospects signing up for a free trial, trying out your service in a sandbox environment, or even simply reading a valuable piece of content you've produced.

You reach out with something of value and establish whether or not they're interested. Think of all this as a softer version of the pure outbound outreach.

3 Qualified Inbound

The third pillar follows on from the previous two and involves reaching out to those warm leads who've already engaged with your product or content.

As a rep, you call those leads to find out why they downloaded that particular piece of content, or why they signed up for a trial, etc.

It's still a warm lead, but that interest may not be at 100% yet. Your job is to go out and identify whether or not they're adequately qualified, or if you need to generate additional interest.

4 Pure inbound

Finally, the fourth category covers all purely inbound leads. These are leads who are already engaging with your content, who are genuinely interested in your product, and sign up without any additional qualification needed.

Which method is better?

Originally, cold outbound sales was the only real strategy. Nobody really had a method for generating inbound sales. Then, in the last decade or so, the birth of content marketing made inbound a much more viable strategy. Ever since then, inbound has dramatically grown in popularity.

As a result, we're often asked which method is the most effective. What should you focus on?

The unpopular answer is: **it depends**. It depends on your specific product, on your ideal customer, and on how long you've been in business. Most companies find a **combination of the two** is necessary for consistent growth. For example, we use all four pillars, spanning both cold outbound and warm inbound, at Reply. Despite inbound's popularity, outbound usually forms the core marketing efforts for any organization, particularly **new startups**.

If you start a company tomorrow, all your business is going to come from outbound leads. Sure, you might get a few referrals, but those still aren't warm leads.

As a result, new companies will benefit most from using outbound methodologies, while more established companies can grow their sales by using inbound strategies.

Taking Action

Which pillar is right for you and your situation? Answer the following questions to find out:

Do you have an established sales funnel?

No

1 you should focus on **Pure Outbound**

Yes

Do you have an offer, such as a free trial or valuable content?

No

1 you should focus on **Pure Outbound** while creating a valuable offer

Yes

Do you have prospects who are already engaging with your company and your offer?

No

2 you should focus on **Pure Outbound** while creating a valuable offer

Yes

Are enough prospects signing up without requiring additional qualification?

No

3 you should focus on **Qualified Inbound**

Yes

4 you should focus on **Pure Inbound** and work on optimizing your funnel

The role of an SDR

With the different approaches to sales, different roles are also needed. SDRs typically handle more outbound activities, while account executives are more likely to deal with inbound methodologies. The SDR focuses on lead generation, while the account executive's role is more about closing the deal.

As an SDR, your objective should be to book meetings and generate leads, not to close. As a result, your compensation is typically based on the number of meetings you've been able to book. Usually, you'll get a bonus if those meetings convert into an opportunity, and an additional bonus if those opportunities close.

Once you've booked a meeting, it's out of your hands. You have no further influence on whether or not the meeting closes. If it's an ideal prospect, then it should generate a qualified opportunity, but if not then it shouldn't negatively affect your results as an SDR. For example, sometimes a lead may book a meeting, but then it turns out it's not a priority for this quarter. At this point, it's out of the SDR's hands and it's up to the account executive to follow up. It's down to the account executive to showcase the value—SDRs are not responsible for selling the solution. You're looking for any trace of interest, then the account executive will take that interest to a higher level.

As the SDR, you're there to plant the seed, and then an account executive is responsible for growing it and nurturing it until that relationship comes to fruition.

The size of the business is also a factor affecting the SDR role. Most small businesses won't even have an SDR. For a mom and pop store, you'll likely have someone operating as a mixture of an SDR and an account executive—a hybrid—because they need to have that complete control of the process. In these situations, sales will include both prospecting and closing deals.

However, in our case (and a good majority of SaaS companies), sales is more about closing, rather than prospecting. The SDR is the one who takes care of the prospecting. The SDRs generate leads, while the sales team close deals. As an SDR you're trying to stay on top of your leads, and convincing them to agree to a meeting with your sales rep.

The goals of SDRs and account executives are very different, so the tactics are very different too. An account executive has to qualify the prospect, to make sure they're a good it. They don't want to be prospecting bad leads as well, which is why that separation of roles is so important.

The role of an SDR is based around research and prospecting. Today that role is becoming more creative, using email, phone, social, and so on, overlapping heavily with marketing.

The Process

It’s critical to have a solid sales process in place if you want to succeed as an SDR. You can’t just pick up the phone and start dialing—not if you want to get noticed.

What does your cadence look like? What do your touchpoints look like? How many emails do you send? What do those emails look like? Are you reaching out on social media? If so, which platforms? Are you using phone calls?

To succeed, you’ll need to consider all these factors and more when building your process, and then make sure you stick to it in a very disciplined manner.

Here’s how to create a winning process:

Training

Before anything else, it’s crucial to have general coaching and sales training in place. Depending on your product, this could be anything from a couple of couple weeks up to several months spent on training. This includes product training, making sure you have an in-depth knowledge of the product and all its features, who the customers are, what their problems are, and so on.

You need to figure out everything you need to know about the product or solution and why that’s important for your prospects. With a lot of startups, you’re thrown into the actual sales way too early. For some

companies, onboarding lasts just two weeks. They can't be successful, because you simply can't become a product expert in that timeframe.

After individual sales training is carried out, that should then evolve into sales coaching. That's where someone like the VP of sales or another SDR manager calls in on a biweekly basis and coaches you through every step of the established process, such as your specific messaging, your follow-ups and so on.

Making sure that training and the necessary resources are available is the first step to a successful sales process. Of course, if you're the first or only SDR in a company, that's not going to be available. In that case, you have to be a little bit more creative and try to find different ways to get the training you need. Getting those first leads without any team to back you up means you'll also need tough skin.

Taking Action

Is there a training program already in place?

☐ Yes ☐ No

Is there sales coaching in place?

☐ Yes ☐ No

Does this include product training?

☐ Yes ☐ No

If no system is in place or it lacks the key components, what methods can I use to ensure I'm a product/customer expert?

- [ ] Interviewing the technical team?
- [ ] Using and testing the product?
- [ ] Interviewing customers?
- [ ] Other methods

Research

The next step to establishing your sales process is research. Before you even start your process, you need to understand your customers and—more importantly—you need to understand their pain points.

One of the big mistakes we see all the time is using generic pain points. For example, 'ROI on advertising' isn't a pain point. That's a goal, something a lot of people get mixed up.

At Reply, one customer profile we have is for recruiters. As a result, we talk about the recruiting landscape and how difficult it can be.

For example, there's a massive demand for good, qualified software developers in Toronto. When prospecting, we would email the relevant person (in this case the CTO, the VP of engineering, the Chief Human Resource Officer, or someone in HR) and show we understand their requirements for talent and we're also aware of the talent shortage in Toronto. We offer to help them find their next round of candidates and ask if they'd be interested.

That's a very **specific**, **real**, and **tangible** problem. If the VP of engineering doesn't have a full team, there's going to be a noticeable impact on the product.

The Predictable Revenue model would be to go to the CEO and ask for an intro to the HR person, but that's not as effective in this situation. They have no reason to forward your request, as they lack any context on that specific pain point.

Taking Action

What are my customer's pain points?

1. ____________________

2. ____________________

3. ____________________

For each pain point, is this:

1	2	3	
☐	☐	☐	Specific, rather than general?
☐	☐	☐	Real, rather than imagined?
☐	☐	☐	Tangible, rather than abstract?

How does my product/service help ease their pain points?

Cadence

Once you have the necessary training in place and a solid understanding of what's going on with your product and your customers, the next step is to outline your cadence. If you're in an established organization, it's likely the ideal cadence has already been determined for you. If you're brand new, there will be no cadence, and it'll be up to you to set that up.

Cadence covers the core of your sales process, such as how many emails you're going to send, how many touchpoints you're going to have with that prospect, etc. You may have heard that it takes 4-7

touchpoints to get in touch with a prospect, but the exact number will depend largely on your deal size. At Reply, we have a deal size of less than $10,000, and 4-7 touch points are ideal. However, an enterprise-level company with deals in the six-figure range will need significantly more touchpoints. A deal size of $300,000 will probably need around 30 touchpoints.

Those touchpoints will be made up of a combination of

Social media

Phone calls

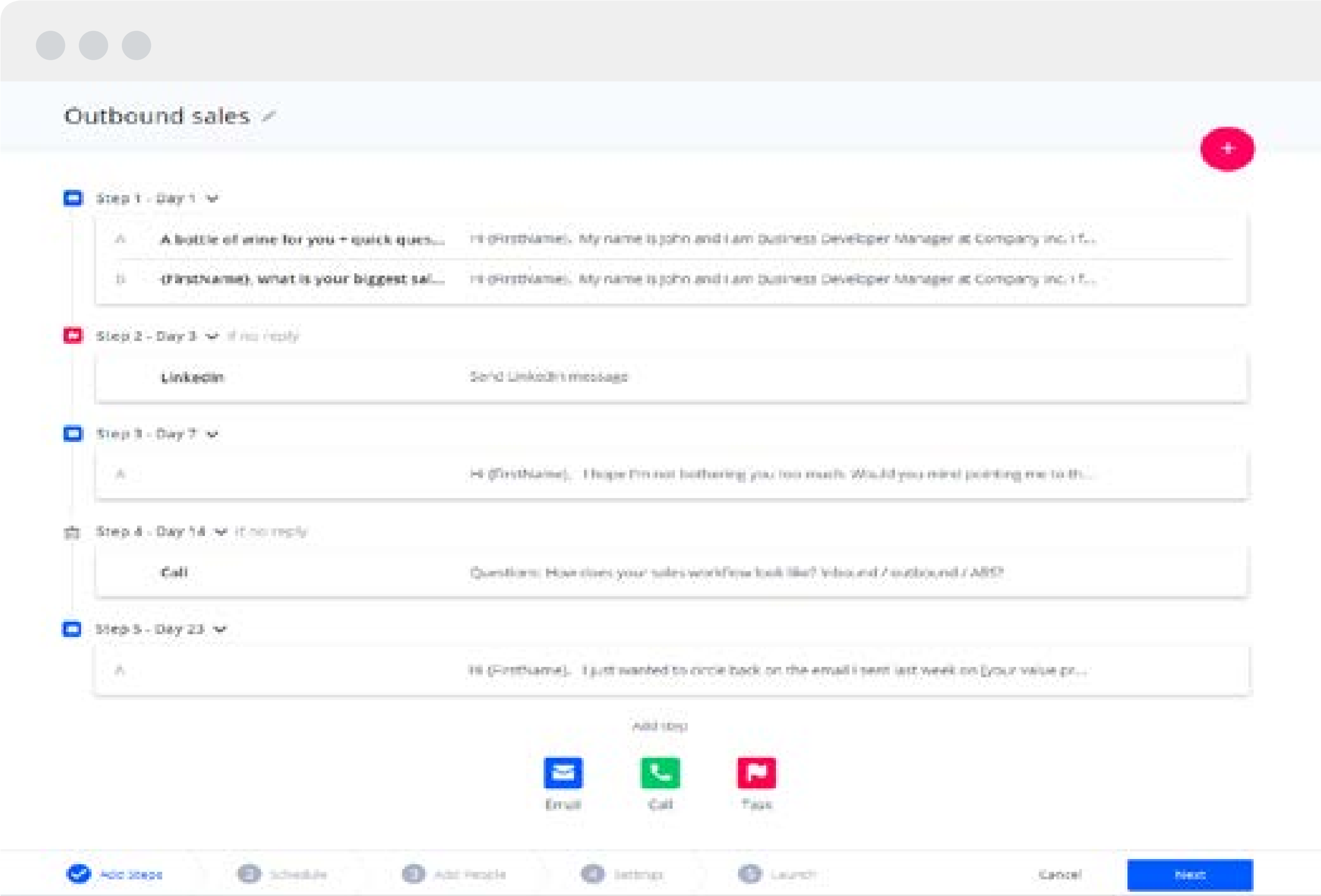
Email

Direct mail

In-person meetings

If you can map this all out, that's going to be incredibly helpful for you and your SDR team. If you have a tool like Reply that can set up your multichannel sequences, it'll take over the bulk of the manual work and automate your emails, voice calls, social touches, booking meetings, or simply setting your 'To Do' tasks. Depending on your process, you can either set up a sequence as manual, automated, or a mixture of the two. If you're a solo SDR, this kind of automation is like having the support of a team who can help out with the heavy lifting.

Of course, if you're the first SDR you need to figure that cadence out, which will take a lot of trial and error. Do you need to send five emails, or are two emails and 10 phone calls more effective? What's realistic and achievable? What's your budget? Do you have access to all the tools you need? What resources do you have to hand?



Taking Action

Confirm the cadence for the process. Record the timing and touchpoints that are to be used. If no cadence is in place, use the following section to measure the performance* of your cadence.

Day#						
Example	Cold email	Engage on social post	Follow up email	Direct mail	Phone call	Follow up email
Test 1						
Test 2						
Test 3						

Day#	Number of people contacted (email and phone)	Number of people connected/conversations (email and phone)	Number of meetings booked
Example	120	30 (25%)	6 (20%)
Test 1			
Test 2			
Test 3			

Can any of the steps be automated with a tool like Reply?

* To ensure you're measuring the effectiveness of just the cadence, keep all other potential factors, such as the messaging, the same for each test.

Resources

Your primary resource will be your sales stack; that's all the sales technology tools you have access to. These include tools to help with lead generation, finding contact information for prospects, and contacting them.

A good place to start is searching online to see what tools other SDRs are regularly using. Unfortunately, the tools you want and the tools you have are likely two different things. When looking at your dream list of tools, which ones do you specifically need for your situation? Which ones do you need right now, and which ones do you need later? Are there cheaper versions or plans available? Are there more expensive tools but with additional features that would be worth the upgrade?

This all comes down to prep work more than anything. If you're the first SDR, you're responsible for that prep, while if you're joining an organization that's all likely part of your onboarding. We'll share more details on building your sales stack later.

Taking Action

When looking at your dream list of tools, which ones do you specifically need for your current situation?

- ✔ ____________________ ✔ ____________________
- ✔ ____________________ ✔ ____________________
- ✔ ____________________ ✔ ____________________

Which tools will be needed later?

- ✔ ____________________ ✔ ____________________
- ✔ ____________________ ✔ ____________________
- ✔ ____________________ ✔ ____________________

Are there cheaper versions or plans available?

☐ Yes ☐ No

Are there more expensive tools but with additional features that would be worth the upgrade?

☐ Yes ☐ No

Discipline and Structure

At this stage, you need to start putting in the work and time. You need the discipline to make a certain number of calls/emails per day, but you also need a defined structure.

In a previous position, one of our team was doing up to 70 dials a day. But he typically had less than 10 connects per day, and most of them were poor quality, such as operators. If he was lucky, he would speak to one or two actual people, and then they weren't interested. The reason? He wasn't **targeting** his outreach. He had a list of accounts he was trying to contact, but his research on those accounts was extremely minimal.

If you're looking for those hundred thousand dollar accounts, you need to research them down to the bone. You need to employ a more account-based sales approach, rather than just smiling and dialing. For smaller deal sizes, you might possibly be able to get away with that, but you'll likely be better off trying another structure.

This means, as discussed earlier, a clear structured process that takes into account your product and your prospects. For a simple product, with high demand and a low price, this might be a simple process. However, for those higher deal sizes, you might need a more strategic process. You might need multiple teams targetting different groups of prospects who are at different stages.

The important thing is to determine what process works best for your product, to clearly outline that process, **then stick to it**.

Taking Action

How many meetings am I aiming to book per week?

How many ‘touches’ do I need to make per day to reach those goals?

Am I contacting prospects that match my target market?

How much research am I carrying out for each prospect?

The Sales Stack

We've already covered the importance of having access to the resources you need. As an SDR there are a lot of tools out there, so you need to really understand what's available and what you need for your specific situation.

To get an idea of what's out there, we highly recommend you check out this catalog of 450+ sales tools.

As you look through the catalog, there are some tools that are more important than others. For an SDR, you'll find apps that help with lead generation, email finders, and email verification particularly useful.

To do your job as an SDR, you'll likely need the following tools as a minimum:

- A method of generating leads (such as LinkedIn Sales Navigator)
- A CRM (to keep track of your leads)
- A dialer (to reach out and talk to your leads)

Once you're ready to move beyond the basics, the secondary tools you should start looking at are sales engagement and email automation/tracking solutions, such as Reply. In 2-3 years, these are going to shift to primary tools but a lot of companies still haven't adopted them, giving anyone using them a distinct advantage.

Reply can actually help you automate the whole process, from initial discovery to booking that first meeting:

1. Our new Chrome extension helps you discover your potential prospects in Gmail, LinkedIn, or anywhere else they hang out online.

2. You can then also use the extension to find their emails and phone numbers, so you can get started on your sequence. You can then use the multichannel sequences feature to nurture your prospect leads through whatever channels work best for them, whether that's emails, calls, or social media.

3. To plan out the working day, use the task dashboard in the Chrome extension to keep track of what's next. Tasks are generated automatically based on your sequences, or you can add them manually. The Task Flow feature will then guide you through the entire flow, one step at a time, to help you stay focused.

4. When you need to get on the phone with your prospect, Cloud Calls allows you to make VoIP calls right from your browser, with features such as a click-to-call dialer, custom caller ID, and call recording

5. Finally, Reply's analytics can help you optimize your sequence and achieve better results. With a CRM integration, you can automatically sync results between both tools, making it even easier to keep track of your progress.

Even the most complex sales process can be automated, without losing any of the personalization and quality that gets you the results.

Once you have the secondary tools that will help you carry out your process, you can start looking into tools to improve your **efficiency**, such as apps for scheduling, conference calls, or sales insights.

Your personal stack will depend on the type of product you have and the industry you're in. For example, how are you doing your meetings? Is it by conference call, or do you rely on in-person meetings? Factors like this will have a huge effect on which tools are optional and which tools are essential.

Taking Action

Look through our catalog of sales tools and see what options are out there that fit your specific requirements.

Priority	Purpose	Requirements	Budget	Selection
Primary	Lead Generator			
Primary	CRM			
Primary	Dialer			
Secondary	Outreach Automation			
Secondary	Email Tracking			
Secondary				
Tertiary*				
Tertiary				
Tertiary				

* Tertiary sales tools are ones that will improve the efficiency of your sales process. The tools you choose will depend on your specific requirements, based on your product, your prospects, and your process. Examples include scheduling, conference calling, and sales insights.

Buyer personas and ICP

Having accurate and reliable buyer personas and ICPs are the keys to highly targeted prospecting. You need to understand who you're selling to and who your ideal customer is. Hopefully, these are already in place, but if you're the first SDR you may have to build these by yourself.

The best way to create accurate buyer personas and ICPs is to look at your existing customers. Look at existing sales, at prospects already in the funnel. What do they have in common? What pain points do they share?

You should also be interviewing as many people as you can within the team who are customer-facing. That means customer support, customer service, and customer success teams should be your best friends.

Finally, you should also talk to the CEO/founder. Find out why the product was originally created.

Spending as much time as you can on these conversations is critical to your success as an SDR. The golden number is **100**. If you can be part of 100 conversations with customers—even if that's indirectly, such as through support or onboarding, etc.—you'll have a much better understanding of your ideal customer.

That understanding and background knowledge will dramatically

Spending as much time as you can on these conversations is critical to your success as an SDR. The golden number is 100. If you can be part of 100 conversations with customers—even if that's indirectly, such as through support or onboarding, etc.—you'll have a much better understanding of your ideal customer.

That understanding and background knowledge will dramatically improve the quality of your prospecting. You'll have a greater insight into your prospects and be more prepared when common questions or concerns are raised.

It's important that buyer personas and ICPs are the same for all departments. If different departments are working from different personas, that's going to be a problem. We've seen organizations with that disparity, where the marketing collateral was not aligned with the sales material, and the results always suffer.

Taking Action

The objective is to have **100** customer-related conversations. These can be conversations held directly with customers, or conversations with people on your team in customer-facing roles.

Use questions like these to identify your customers and how you can best reach them.

What industry do they work in?

What is their job title?

What is their budget?

What are their pain points? What keeps them awake at night?

How do they currently deal with their pain points? What tools/ technology are they already using?

What are their KPIs?

What would success look like for them?

Messaging

Finding the right messaging for your prospecting isn’t easy, and will involve more trial and error before you find what works best. However, there are some points to consider that will improve your results.

As an SDR, you should build your messaging around generating interest in your product/service. To do this, you need to base your messaging on your personas, specifically their problems and pain points. You need to understand the product and build the messaging around how that solves your prospect’s problems.

Messaging is very similar to positioning. How are you positioning your product in front of your ideal customer? Are you positioning as a platform, as a solution, as a channel, or as a one-time transaction? The messaging comes down to your value proposition, and how you’re positioning it.

What definitely doesn’t work is being inauthentic. You need to be genuine in your messaging, to build trust between you and your prospects. So what about templates? Should you use them for your outreach, or are they inauthentic?

In our experience, templates are a good baseline. If you want to run a test campaign for one or two weeks, then templates are a great way to get you started. That’s why we’ve included templates with Reply and shared examples on our blog, to help you get those first emails sent.

However, we also think templates can only get you so far. To stand out and succeed as an SDR, you need to adopt an agile mindset, especially if you're the first SDR at a company. You have to be constantly testing and experimenting with different approaches, measuring the results, and then building on them. Templates are a good starting point if you have nothing, then carry on until your campaign is generating leads. Then you can optimize your process to get better results (and hopefully hire some additional people to help with the process).

Taking Action

Remember, messaging should be based around your customers' pain points. Use these templates as inspiration and to get started, but be prepared to modify them to suit your prospects, and then optimize as you start getting results.

1 Based on current technology

Hey {FirstName},

My name is Daniel.

The reason I'm reaching out is that I was browsing {Company}'s website and I noticed that you're using Shopify as your eCommerce platform.

While we are focusing on marketing services for stores that are built on {eCommerce platform} and already helped {Company1} and {Company2} with SEO and PPC for their online stores, I thought we might have a great synergy.

Are you available for a brief call next Wednesday at 1PM EST?

2 Based on identified need

Hi {FirstName},

I'm reaching out to you because I noticed that you are expanding your sales team at {Company}. I assume, as a {ProspectTitle}, you want your company's sales to grow as well, so would you like an idea of how to boost {Company}'s email outreach activities?

Reply is designed for sales teams and helps them to grow their pipeline by using our platform to double their number of conversations with right-fit accounts and contacts. It achieves this by automating sales communications with existing and prospective clients while keeping them warm and personal.

Are you available for a 10-minute call to see how we could help {Company}'s sales team?

3 Based on prospect activity

Hi {FirstName},

AJ from Reply here leading the Growth Team – an outreach automation tool for sales teams.

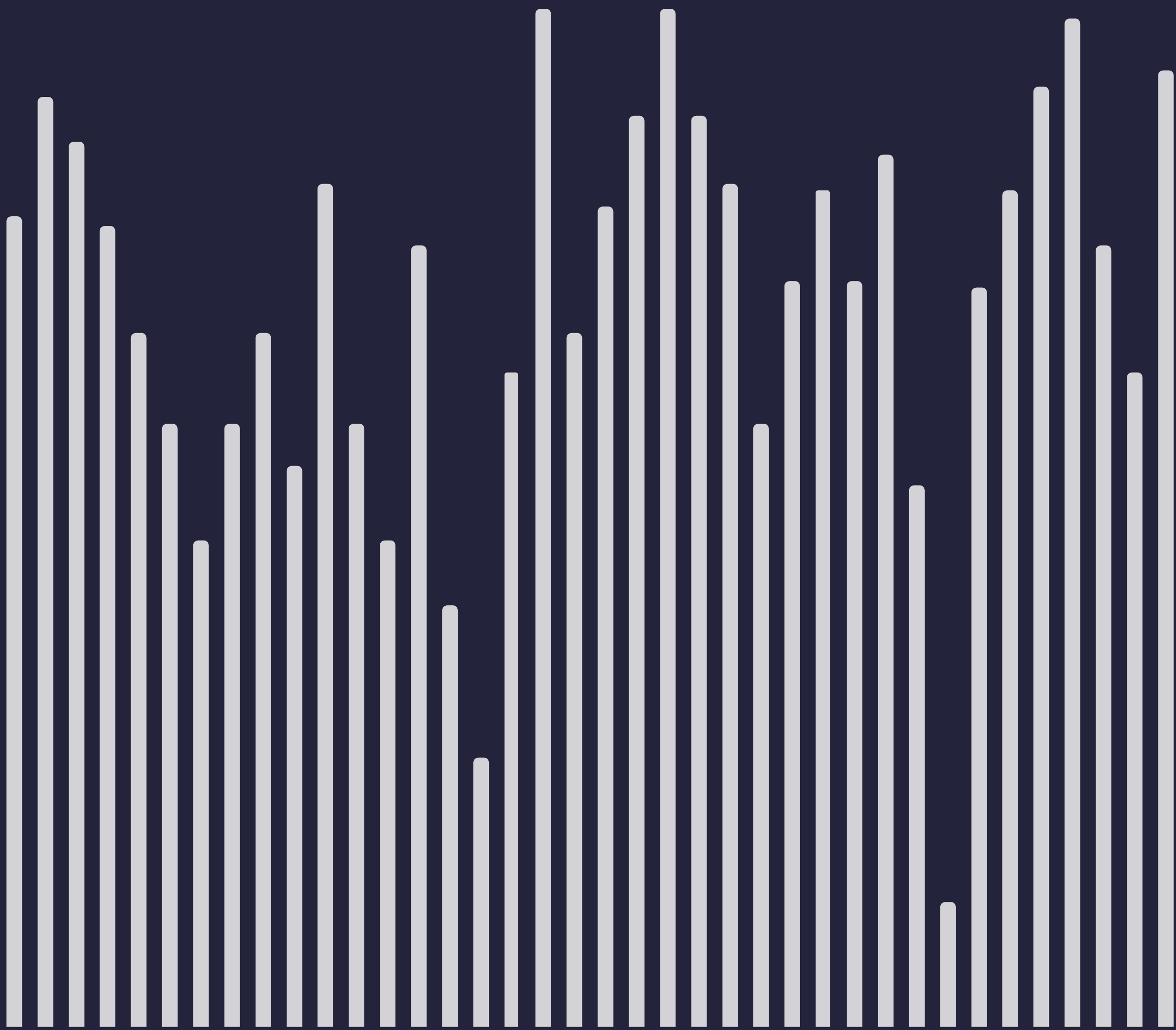
I'm writing to you because I noticed that a number of your colleagues at {Company} have visited our website a lot during the last few weeks.

I was wondering whether they were trying to figure out how {Company} might improve cold outreach to your existing and potential customers?

With the number of people researching our company, would it make sense to talk for 10 minutes one of these days?

Thank you for your time.

KPIs



In order to measure your performance and identify any areas for improvement, it's important to establish your KPIs. As we've already covered, for SDRs, these are usually based on how many meetings you've booked.

However, what's more important? The quantity, the number of meetings booked with prospects, or the quality of those prospects? What's best?

It depends on your average deal size.

Obviously quality is very important. As we've already mentioned, SDRs are often given bonuses based on how many meetings convert into opportunities, and then again on how many of those opportunities close, which clearly is affected by the quality of those prospects.

In addition, if your average deal size is six-figures, there's no way you can prioritize quantity over quality. Those relationships are not built—or closed—overnight.

However, if your average deal size is comparatively lower, then aiming for quantity is definitely viable. For example, with our typical deal size of $1,000, we have a much larger market, making it more of a numbers game.

As a general rule, if your average deal size is less than $10,000, then you can focus on quantity. If your average deal size is more than $10,000, then you'll need to focus on quality. However, the exact figures will vary depending on your product and service. Typically, the higher your deal size, then the more you need to focus on quality.

Taking Action

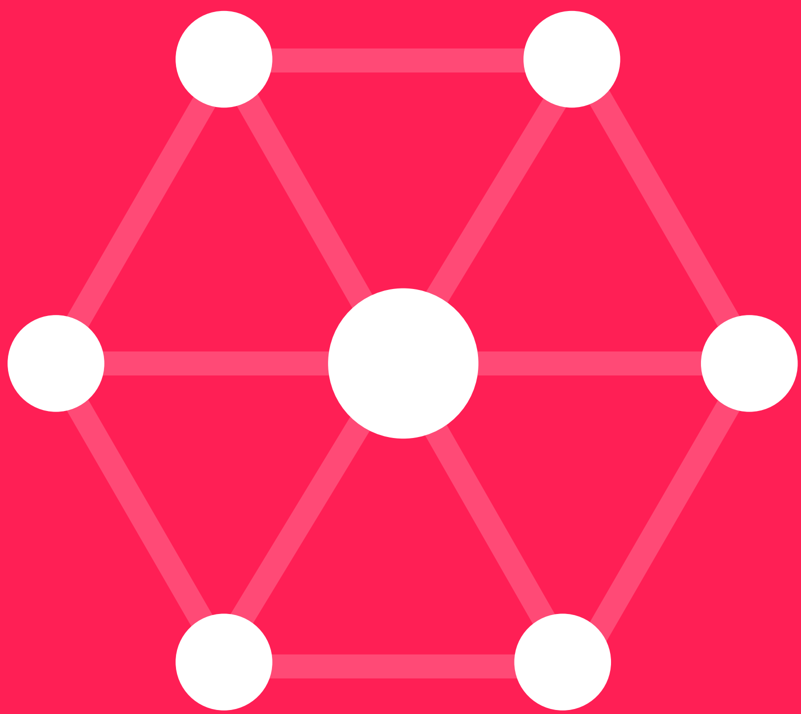
How is your performance being measured?

Remember, SDRs are traditionally compensated based on the number of Meetings Booked.

What is your average deal size?

If less than $10,000, prioritize the number of meetings booked.
If more than $10,000, focus on booking meetings with high-quality prospects.

I will focus on the quality/quantity of meetings booked (delete as appropriate).



CRM tips

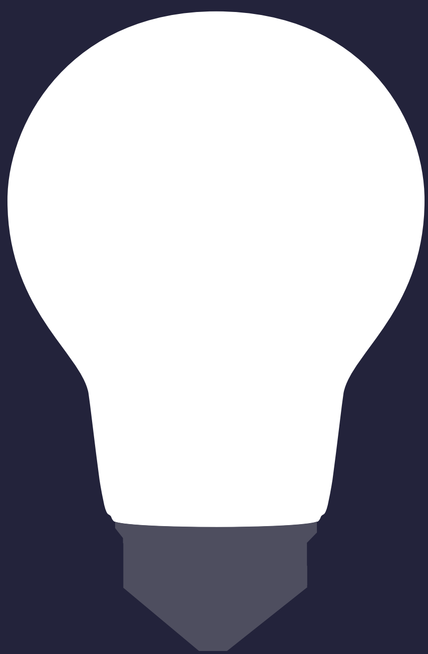
As one of the primary tools in your sales stack, an SDR should live and breathe inside their CRM. However, simply having a CRM is not enough. You need to be familiar with it, to know how it operates, and then make sure you keep it up-to-date with the latest information.

If you're the first SDR, then you have to set up and implement a CRM, in which case we recommend looking through your options and choosing a CRM that fits your particular needs.

Whether you're setting up a CRM from scratch or using an existing solution, your most important task is to make sure all your activities are being logged into the CRM. That includes your dials, your emails—all your outreach. That will then reflect your performance, and you will be able to identify how to improve your activity. For example, should you do 60 dials on a Tuesday, or should you do that on a Wednesday? That's how granular you want to get with your activity metrics.

Taking Action

- Familiarize yourself with the CRM and all its features
- Review any existing data and delete any obsolete/irrelevant details
- Ensure all prospect contact data is current and correct
- Use integrations to automatically update prospect activity from emails etc. where possible
- Manually update any additional activity (where automations aren't available)



Final advice

If you are the first SDR, then it's a very frustrating role. You need to figure out everything from scratch, yet you still want to see results straight away. We see a lot of companies with ramp-up times of three months or six months for SDRs, but it should be much more. In our experience, a ramp-up time of **14 months** is more appropriate, to allow enough time to understand everything and implement a meaningful process. A lot of mistakes are because of that high level of pressure. People get desperate and end up doing things they wouldn't otherwise, such as the old 'smile and dial,' reaching out to hundreds of people without targeting their ideal customer or taking the time to follow-up.

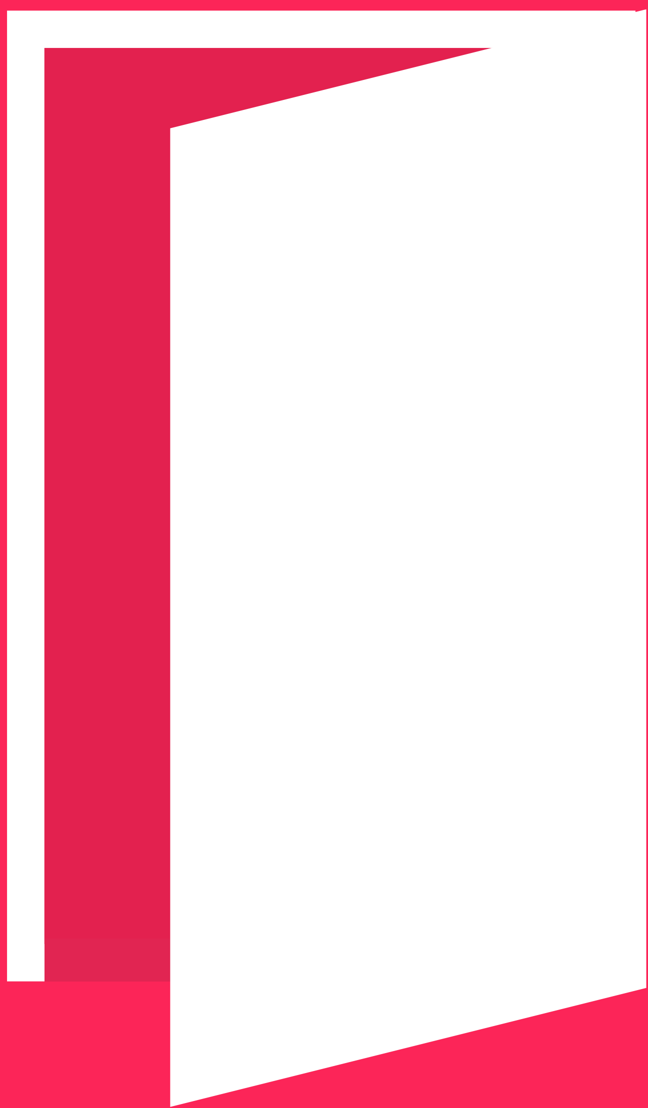
Find the approach that works for you. Everyone has their own thing. Some of our team hate demos, so they don't do them. Instead, they might offer to send prospects a video of a demo and then walk them through it. If that's their preferred approach and it works, that's what matters. Other people on the team love to do demos, and they're very successful at closing business that way. For everyone, it's going to be different.

In the beginning, it's important to **attach success to small increments**. Your goal might be to book 10 meetings a day, but that's hard. It'll take you a year to figure out how to book 10 meetings a week. A lot of SDRs are fresh out of college, and this may be the first job you've ever had. You've got to figure out your sales stack, your ideal customer, your messaging, your cadence, and so on, all with no idea where to start.

There's a lot of data points you need to figure out and that could be overwhelming for a lot of people.

Learn to **manage expectations**. One of our team recalls the following experience in a previous organization: *"In one of my previous organizations, the expectation was to generate 25 meetings a month, to close a meeting a day. I was doing something like nine a month, and of those nine, only a few would convert. It didn't work out, and I ended up leaving the organization."* Managing those expectations and understanding what success looks like is important, especially if you're the first SDR and you're having to figure out everything yourself. If there's no one there to coach you, it can be very scary. That's why you need to set expectations. If you know you can't meet the expectations for a specific role and you're not able to change them, then you shouldn't be afraid of rejecting that job. You'll either end up quitting or getting fired.

Our biggest piece of advice is to **be coachable**. Being humble and willing to learn from all sorts of sources will take you far. Looking back at our careers in sales, our team has been able to leverage all that experience—the good and the bad—and put it to use in our current positions. That's where we found the discipline needed to succeed.



Before you go...

1. **Sales Commission Calculator** - Working on commission? This calculator will tell you exactly how much you'll earn, whether you're working on a simple revenue based commission, a tiered commission, or a SaaS commission that takes into account lifetime value. Definitely a resource worth bookmarking!

2. **Reply Academy** - A place to learn how to scale your 1:1 communication and accelerate sales. Includes our outbound sales mastery course and our Guide to Email Campaign Launch, email deliverability.

3. **Name2Email** - Trying to find a prospect's email? This free chrome extension makes it easy, all from within Gmail.

4. **Email Reply Templates That Save Your Time** - This handy guide will talk you through the principles of creating and using your own unique templates.

5. **20 Email Outreach Templates to Grow Your Business** - If you're still looking for inspiration, here are 20 of our favorite templates at Reply. Whatever situation you're in, you're bound to find something that will help here.

6. **How To Get Your Cold Emails Noticed, Read & Replied To** - Cold email is a big subject, one that needs its own separate guide. So we wrote one. This will answer every question you could have on cold email, and a few more besides.

7. **58 Best Free Sales Tools** - Trying to build out your sales stack, but lack the budget for the tools you want? The good news there are plenty of tools out there which let you get started without spending a cent. Here are our favorites.

8. **Creating Buyer Personas: The Biggest Mistakes** - Accurate buyer personas are crucial if a campaign is going to succeed. However, there are plenty of mistakes that can trip you up. This series of interviews runs through those mistakes so you don't have to.

9. **A Beginner's Guide to Follow Ups: When, Why, How (many)** - We've already established that it's going to take more than one touchpoint to book that meeting. If you want to know more about what goes into a follow-up, this is the place to start.

10. **Top Follow-Up Tips To Raise Your Response Rate** - If you're already sending out follow-ups but are ready to take your game to the next level, this series of interviews will give you plenty of tips to get started.

The Pitch

Reply is a sales automation platform made for SDRs just like you. More than that, we built our business with it. We're constantly working on coming up with new features to make it even better, such as those multichannel campaigns and cloud calling features we mentioned earlier. Of course, we don't expect you to take our word for it. Try out Reply with a 14-day trial and see for yourself.

Finally, we hope this playbook has been helpful. However, if you still have any questions, or if you have any feedback, we're always happy to talk sales. Email us at sales@reply.io. We look forward to hearing from you!